**ANNEXURE A**

**REQUIREMENTS AND SPECIFICATIONS:INTERGRATEDLIBRARY MANAGEMENT SYSTEM (03 YEARS)**

|  |  |  |  |
| --- | --- | --- | --- |
| **BACKGROUND:** | **SPECIFY** | | |
| Name of library system |  | | |
| Manufacturer |  | | |
| Country |  | | |
| Company/Distributor in SA for support purposes |  | | |
| Customer base in SA |  | | |
| **SPECIFICATIONS:** | **YES** | **NO** | **COMMENT** |
| Integrated library system hosted in-house |  |  |  |
| System demonstration (**compulsory**) |  |  |  |
| Vetting of company and consultants visiting the site for implementation (**compulsory**) |  |  |  |
| Integration with other applications (eg SAP) |  |  |  |
| Quote valid for 3 months from date issued |  |  |  |
| Annual payment per financial year |  |  |  |
| **ACQUSITION:** | **YES** | **NO** | **COMMENT** |
| Create vendor/supplier profile |  |  |  |
| Load (virtual) budget |  |  |  |
| Split budget by cost centres |  |  |  |
| Create and update of item records for ordering of library material |  |  |  |
| Order production and transmission |  |  |  |
| Process/upload received items |  |  |  |
| Accessioning |  |  |  |
| Process received invoices |  |  |  |
| Payment and remittance advice |  |  |  |
| Ability to checkin by location |  |  |  |
| Generate routing lists and ability to email |  |  |  |
| Generate claims |  |  |  |
| Ability to define and amend the claim period for each vendor |  |  |  |
| Ability to suppress the claims for individual items and subscriptions |  |  |  |
| Ability to flag claims to review before they generated |  |  |  |
| Cancellation of orders |  |  |  |
| Budget monitoring, commitments and expenditure |  |  |  |
| Order record automatically generate status through cataloguing and OPAC |  |  |  |
| Licenses management including digital versions |  |  |  |
| Ability to handle standing orders |  |  |  |
| Ability to print orders (MS Word, Excel and PDF) |  |  |  |
| Ability to handle donations |  |  |  |
| Generate manage reports |  |  |  |
| Statistics |  |  |  |
| Audit |  |  |  |
| **CATALOGUING:** | **YES** | **NO** | **COMMENT** |
| Create/add, edit and delete records |  |  |  |
| Ability to support/manage library material in multiple formats |  |  |  |
| Ability to create analytical records for all material and all record formats |  |  |  |
| Ability to verify information (eg not allow two books with same ISBN) |  |  |  |
| Search, update and recall production record |  |  |  |
| Search and update OPAC record |  |  |  |
| Copy cataloguing - Z39.50 download capability |  |  |  |
| Copying and loading of MARC records |  |  |  |
| Inventory control |  |  |  |
| 10 and 13-digit ISBN compliance |  |  |  |
| Authority file maintenance |  |  |  |
| Ability to see information on who makes changes to the records, when it was done, and what was changed |  |  |  |
| **SERIALS:** | **YES** | **NO** | **COMMENT** |
| Journal management including routing and prediction scheduling |  |  |  |
| Automatic reminder of late issues and claims |  |  |  |
| Bibliographic journal records to link with serials (holdings) |  |  |  |
| **CIRCULATION:** | **YES** | **NO** | **COMMENT** |
| Issues |  |  |  |
| Returns |  |  |  |
| Renewals |  |  |  |
| Requests/reservations |  |  |  |
| E-reservations |  |  |  |
| Recalls/Holds |  |  |  |
| Blockings |  |  |  |
| Offline circulation |  |  |  |
| Fining system |  |  |  |
| Notification on check-in if item is overdue & fine applicable |  |  |  |
| Notification on check-in about requests/reservations |  |  |  |
| Item loan history |  |  |  |
| Item memos |  |  |  |
| Ability to automatically generate real-time notices/reports in a range of formats; print and e-mail |  |  |  |
| Text and format of notices must be library-defined |  |  |  |
| Ability to automatically and manually cancel the expired and uncollected reservations |  |  |  |
| Notices/reports according to parameter settings |  |  |  |
| Ability to add, edit and delete clients |  |  |  |
| Client loan history, payment history, request history, etc |  |  |  |
| Client current loan records |  |  |  |
| Request renewal |  |  |  |
| Fines and fees |  |  |  |
| Lending statistics (items checked-out, items checked-in etc) |  |  |  |
| Overdue reports |  |  |  |
| Client memos |  |  |  |
| Print/save of all listed reports |  |  |  |
| Flagging of reports |  |  |  |
| ILL requests between libraries |  |  |  |
| Authority file maintenance |  |  |  |
| **ONLINE PUBLIC ACCESS CATALOGUE (OPAC):** | **YES** | **NO** | **COMMENT** |
| Integration with library website / intranet |  |  |  |
| Help facilities |  |  |  |
| Basic search |  |  |  |
| Advanced search |  |  |  |
| Journal search |  |  |  |
| Search and save searches |  |  |  |
| Search refine |  |  |  |
| Sort search results/items |  |  |  |
| Select records or range of records for downloading |  |  |  |
| Save search results (pdf, html, etc) |  |  |  |
| E-mail search results |  |  |  |
| Borrower username and passwords to access online account |  |  |  |
| Logout after using the system |  |  |  |
| E-reservations |  |  |  |
| E-renewals |  |  |  |
| Borrower self service: lending history, current loans/renewals/reservations (including fines and fees) |  |  |  |
| Profile information setting/updating |  |  |  |
| Books on order display |  |  |  |
| Place purchasing suggestions (patron driven acquisition) |  |  |  |
| Submit request for an item not held |  |  |  |
| Ability to see current request for item not hold |  |  |  |
| Create alerts on special interest profile (CAS/SDI) |  |  |  |
| Visible who is logged into the system |  |  |  |
| **REPORTS/ STATISTICS:** | **YES** | **NO** | **COMMENT** |
| Generate full reports / statistics in different formats: table, graphs, charts, etc |  |  |  |
| **SYSTEM ADMINISTRATION:** | **YES** | **NO** | **COMMENT** |
| Visible who is logged into the system |  |  |  |
| Configure user privileges according to staff responsibilities |  |  |  |
| Ability to control user privileges to edit particular fields/areas and record types |  |  |  |
| Windows-based administration and management |  |  |  |
| Integration of all modules |  |  |  |
| Set up authority files |  |  |  |
| Set up parameters for all system functions/modules |  |  |  |
| Monitor log files |  |  |  |
| Backups – save on different server than database |  |  |  |
| Ability to uploading client SAP HR records (personnel) |  |  |  |
| **SYSTEM / TECHNICAL REQUIREMENTS: ARCHITECTURE / PERFORMANCE REQUIREMENTS:** | **SPECIFY** |  | **COMMENT** |
| Server requirements |  |  |  |
| Programming Language |  |  |  |
| Other (specify) |  |  |  |
| Standards | MARC21, Z39.50m MARC, UniMARC, UNICODE |  |  |
| **MAINTENANCE /TECHNCAL SUPPORT** | **YES** | **NO** | **COMMENT** |
| Maintenance |  |  |  |
| Technical support |  |  |  |
| **FUTURE ENHANCEMENTS / UPDATES:** | **YES** | **NO** | **COMMENT** |
| Platform to register future enhancements should be part of system upgrade and covered by maintenance costs |  |  |  |
| **PROJECT PLAN / IMPLEMENTATION:** | **YES** | **NO** | **COMMENT** |
| Outline on important steps for implementation |  |  |  |
| **FREE TRAINING:** | **YES** | **NO** | **COMMENT** |
| Free training on all system modules including reporting and system administration: 10 staff members (estimate) |  |  |  |
| **ATTACH QUOTATION:** | | | **COMMENT** |
| 1. Number of stock items for three (03) Libraries:   * Library 1 (Pretoria): 14 441 * Library 2 (Pretoria): 9 030 * Library 3 (Mahikeng): 7 641   **Total no of items: 31 1120**  2. Total number of staff members for three Libraries: 10 (estimate)  3. Breakdown of the quotation: Firm price including maintenance and support (VAT inclusive) for a period of three (03) years   |  |  |  |  | | --- | --- | --- | --- | | **Year 1**  **Pricing** | **Year 2**  **Pricing** | **Year 3**  **Pricing** | **Total Pricing for 3 yrs (VAT inclusive)** | |  |  |  |  | | | |  |